Subject: Permanent Brown/Blue File and Pending File Assembly

Effective Date: July 1, 2010

Policy Statement:

CYSHCN files must be maintained in an orderly and uniform manner to expedite the responsiveness to the clients and providers.

Procedure

Assemble the Brown/Blue Permanent File as follows with the most current information on top and the oldest information on the bottom.

First Section:
- Application, face sheet first
- Financial verification from all people living in home
- Relevant legal documents (custody, adoption, divorce, etc.)
- Reapplication letter while awaiting response-destroy if application is received prior to deadline, move to Section 6 if application comes in after the deadline or closure occurs.
- Financial Computation—income for all living in household
- Closure letters
- Transmittals from field office regarding status—move to Section 6 when no longer needed in day-to-day work
- SSI transmittal face sheet
- Intake sheet
- PCP/HMO referral request while waiting for reports

Second Section
- Reports-medical, health and school, orthodontic review, other relevant
- Bequest Fund requests

Third Section
- Health Care Plans
- CYSHCN Authorizations
- Medicaid Prior Authorizations
- Signed Primary Care/HMO referral forms—to remain on top of the current authorization

Fourth Section
- Processed claims, in chronological order by date of services
- Medicaid Spenddown Notices, not current
- Medicaid KBH information, not current

Fifth Section

All services are limited to available CYSHCN funding and reimbursement rates.

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- Pending bills in chronological order by date of services
- Medicaid Spenddown Notices, current
- Medicaid KBH information, current
- Medicaid Eligibility History Sheet, current
- Insurance Letters regarding coverage, current

Sixth Section
- Narrative printouts
- Correspondence, including transmittals from field office, parents, providers if not a report, PCP/HMO referral requests after referral received

Assemble the <u>Manila File Folder</u> (pending file) in the following manner:

- File all information in the folder.
- Identify status of the file on the front of the file in the appropriate spaces.

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